

MODULE 2: ASSESSING INDIVIDUAL STRENGTHS AND NEEDS**TIME:** 60 Minutes**PURPOSE:**

Module 2 provides participants with an overview of the wide range of individual and family strengths and needs and is designed to have participants begin to think broadly and creatively about how to assess them. Participants will be encouraged to recognize the ways in which traditional service categories and definitions have narrowed our thinking about individuals and families. Participants will leave with a new approach that will move participants beyond their personal perception of need and focus on the individual and families' strengths and needs to determine appropriate services. Specifically, this module will cover the extent to which individual and families' needs and strengths are currently being assessed at participants' facilities and provide an opportunity to discuss the variety of needs and strengths within major categories such as:

- Medical;
- Psychological;
- Educational;
- Vocational;
- Financial;
- Housing;
- Legal;
- Family/Child Care;
- Transportation; and
- Other.

LEARNING OBJECTIVES :

Upon completion of this module, participants will be able to:

- Use alternative ways of recognizing individual and families' needs and strengths; and
- Embrace and implement the philosophy that assessment is not a one time event and consists of endless opportunities for increased understanding of individuals and families.

MODULE AGENDA:

A. Purpose and Learning Objectives of Module 2	1 Minute
B. Discussion of Perception of Needs and Strengths	30 Minutes
C. Gallery Walk	29 Minutes

TRANSPARENCIES :

T-2.1: Three Perspectives of Need

T-2.2: Overlapping Perspectives of Need

T-2.3: Examples of Individual and Family Needs

T-2.4: Examples of Individual and Family Strengths

HANDOUTS :

H-2.1: Case Study

H-2.2: Definition of Need and Strength

H-2.3: Instructions for Gallery Walk

PREPARED NEWSPRINT :

- One piece of newsprint for each of the 10 major categories of needs or strengths listed above – Newsprint will be divided into strengths column and needs column with two examples of each listed;
- Definition of Need; and
- Definition of Strength.

ADDITIONAL SUPPLIES :

- About one pad of 3" by 3" Post-it pads for every three or four participants distributed to the participants' tables before the module begins;
- Masking tape; and
- A CD player and music suitable for quiet reflection.

1 Minute**A. PURPOSE AND LEARNING OBJECTIVES OF MODULE 2**

The Facilitator should spend a few minutes discussing the module cover sheet and reviewing the purpose and learning objectives of Module 2.

30 Minutes**B. DISCUSSION OF PERCEPTION OF NEEDS AND STRENGTHS**

The Facilitator should emphasize that the themes being discussed during the training are not new. We are dealing with perceptions and the need to rethink our perceptions of clients' needs as the behavioral health field is going through changes and transitions in the way we deliver services. For example, we usually think of services from a service provider or program focused perspective. The Facilitator should ask the participants for examples of what this means after offering an example. The example could be that typically a service provider's hours of operations are for the convenience of the staff rather than the clients.

The Facilitator should state that this is what is meant by transitioning to a client- or customer-focused treatment model. The change will not happen overnight, but this training is a step toward implementing the change. It should be the customers/clients that define quality—not the service providers.

To demonstrate the power of perception, the Facilitator will have the participants conduct the following exercise.

The Facilitator will ask the participants to look around the room for 15 seconds. After the 15 seconds, the Facilitator will have the participants look around the room for another 15 seconds, but this time the participants should look for circles. After the 15 seconds, the Facilitator should ask, "What was different the second time?" The answer should be that there was a focus or context, which allowed the participants to identify circles that were not seen the first time.

The Facilitator should point out that there was a cost to focusing on circles as the participants did not see other shapes. The Facilitator should make the analogy to the assessment process which helps us focus on services rather than needs, which keeps us program-focused rather than client-focused.

The Facilitator should emphasize the philosophy that assessment is not a one-time event and consists of endless opportunities for increased understanding of individual and families. The Facilitator should tell participants that re-assessment can take place at specific intervals and at transitions during treatment or in response to changes in the individual and families' circumstances. These re-assessments should consider the individual's and families' ongoing and changing needs for intervention



T-2.1 and T-2.2

and support services.

The Facilitator should present T-2.1: *Three Perspectives of Need* and note that the three circles represent the perspective of need from the viewpoint of the individual and family, counselor and other involved individuals. Then, present the second graphic, T-2.2: *Overlapping Perspectives of Need*, and discuss the importance of the intersecting circles. The Facilitator should note that today we are focusing on the treatment provider perspective.

In the past when we have been asked to identify the need of the consumer we have been trained to answer with a service. For example, for an individual who has been voicing serious intent to harm him/herself, we traditionally describe the need as inpatient services.

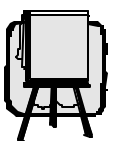


T-2.3

It is now imperative for us to change the way we view our consumers so that we are more open and understanding of how best to assist the individual and families in recognizing their true need and the variety of responses to those needs. The Facilitator should show T-2.3: *Examples of Individual and Family Needs* and note:

Following are examples of individual and family needs:

- Awaken on time
- Someone to talk to
- A way to get to work
- A way to care for the children when working
- A break from the constant supervision of a child
- Social interaction
- A way to get groceries
- To feel like he/she belongs
- To receive care in a coherent and coordinated way



Definition of Need



The Facilitator should show newsprint *Definition of Need* and handout H-2.1: *Definition of Need and Strength* and define a need as something that is necessary or wanted to improve individual or family functioning. In other words, a need is something that must be addressed to achieve a desired outcome for the individual or family.

The Facilitator should handout H-2.2: *Case Study* and ask each table to take 5 minutes to identify individual and family needs that appear in this scenario. The Facilitator should remind participants to only identify needs and not services. The Facilitator should ask each table to appoint a person to report out the needs that were identified by each table and discuss for 10 minutes.



T-2.4

The Facilitator should explain that it is equally as important to identify individual and family strengths as well as needs, and show T-2.4: *Examples of Individual and Family Strengths* and note:

Following are examples of individual or family strengths:

- A means of transportation
- Taking medications as prescribed
- Job skills
- Supportive family
- Circle of supportive friends
- Sober/safe living environment
- Good communication skills
- Understands the illness
- Self-motivated
- Creative
- Desire to work or go to school
- History of extended periods of abstinence



Definition of Strength

The Facilitator should show newsprint *Definition of Strength* and define strength as a quality or support that an individual or family possesses that will assist in achieving a desired outcome.

Using the same handout, the Facilitator should ask each table to take 5 minutes to identify individual and family strengths that appear in this scenario. The Facilitator should ask each table to appoint a person to report out the strengths that were identified by each table and discuss for 10 minutes.

C. GALLERY WALK

29 Minutes

The Facilitator should note that for the purposes of this exercise we will be using 10 major categories. We realize these categories may be arbitrary, but we will use them for the purpose of today's discussion. They are:

- Medical;
- Psychological;
- Educational;
- Vocational;
- Financial;
- Housing;
- Legal;
- Family/Child Care;
- Transportation; and



10 Categories**H-2.3**

- Other

(Note to Facilitator: On each large sheet of paper the Category will be listed and then the paper will be divided down the middle with Strengths Listed on one side and Needs listed on the other side. Under each put examples to help the process along.)

The Facilitator should handout H-2.3: *Instructions for Gallery Walk* and then ask participants to think about their own contact with consumers and write three specific individual and families needs and three strengths that fall under these categories on the Post-it notes, with one strength or need per Post-it note. The Facilitator should direct them to place the Post-it notes under the most appropriate category. The Facilitator should then play the music and invite participants to walk around the room, review the notes, and quietly reflect on various individual and families needs/strengths listed under each area.

The Facilitator should lead a discussion by summarizing participant responses to each newsprint, focusing on the following questions:

- What did you learn from this exercise?
- How does this exercise affect the way you look at individual and families strengths and needs?

T-2.1: Purpose and Learning Objectives of Module 2**Purpose**

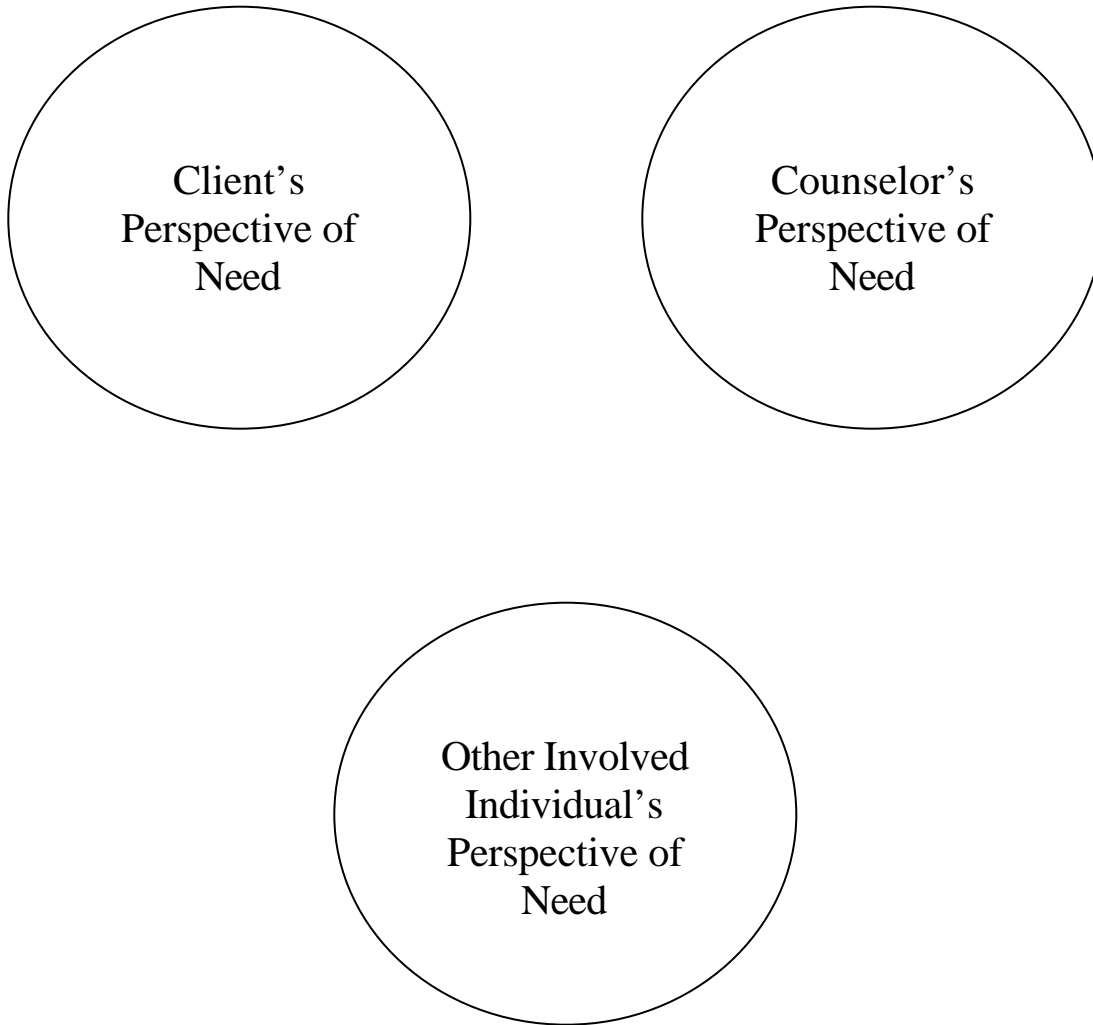
Module 2 provides participants with an overview of the wide range of client needs and is designed to have participants begin to think about how to assess client needs. Specifically, this module will cover the extent to which client needs are currently being assessed at participant's facilities and provide an opportunity to discuss the great variability of needs across major need categories.

Learning Objectives

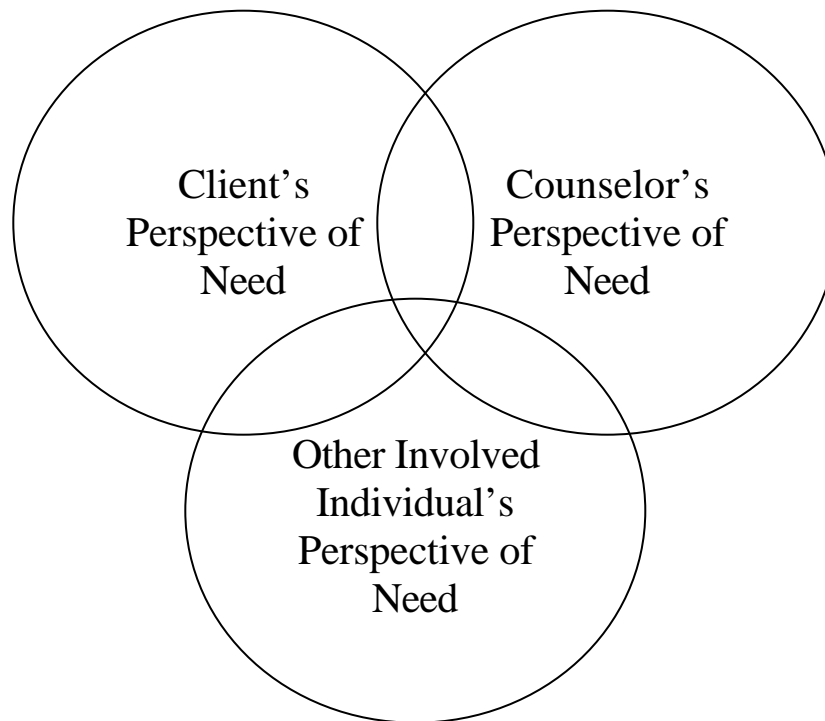
Upon completion of this module, participants will be able to:

- Recognize the major areas of potential client needs;
- Understand the variability within each area;
- Identify needs that are currently being included in their client's treatment/service plans; and
- Identify the needs that may not be receiving adequate attention.

T-2.2: THREE PERSPECTIVES OF NEED



T-2.3: OVERLAPPING PERSPECTIVES OF NEED



T-2.4: 11 MAJOR CATEGORIES OF CLIENT NEED

Although these categories may be arbitrary, for the purposes of today's discussion we have organized the wide range of client needs into 11 major categories. They are:

- Medical;
- Psychological;
- Educational;
- Vocational;
- Financial;
- Housing;
- Legal;
- Family/Child Care;
- Transportation;
- Continuing Care/Aftercare; and
- Other

H-2.1(A): FREQUENCY OF ASSESSMENT-COUNSELOR

How often do you assess client need in the following areas? To what extent do you actively follow-up on the provision of services to meet these needs?

1. Medical Services

Frequency of Review	Extent of Follow-up			
	Not At All	To Some Extent	To A Great Extent	To A Very Great Extent
A Not Applicable	A	A	A	A
A Weekly				
A Bi-monthly				
A Monthly				
A Greater than monthly				
A At Admission only				
A At Admission & Discharge only				

2. Psychological Services

Frequency of Review	Extent of Follow-up			
	Not At All	To Some Extent	To A Great Extent	To A Very Great Extent
A Not Applicable	A	A	A	A
A Weekly				
A Bi-monthly				
A Monthly				
A Greater than monthly				
A At Admission only				
A At Admission & Discharge only				

Educational Services

Frequency of Review	Extent of Follow-up			
	Not At All	To Some Extent	To A Great Extent	To A Very Great Extent
A Not Applicable	A	A	A	A
A Weekly				
A Bi-monthly				
A Monthly				
A Greater than monthly				
A At Admission only				
A At Admission & Discharge only				

3. Vocational Services

Frequency of Review	Extent of Follow-up			
	Not At All	To Some Extent	To A Great Extent	To A Very Great Extent
A Not Applicable	A	A	A	A
A Weekly				
A Bi-monthly				
A Monthly				
A Greater than monthly				
A At Admission only				
A At Admission & Discharge only				

4. Financial Services

Frequency of Review	Extent of Follow-up			
	Not At All	To Some Extent	To A Great Extent	To A Very Great Extent
A Not Applicable	A	A	A	A
A Weekly				
A Bi-monthly				
A Monthly				
A Greater than monthly				
A At Admission only				
A At Admission & Discharge only				

5. Housing Services

Frequency of Review	Extent of Follow-up			
	Not At All	To Some Extent	To A Great Extent	To A Very Great Extent
A Not Applicable	A	A	A	A
A Weekly				
A Bi-monthly				
A Monthly				
A Greater than monthly				
A At Admission only				
A At Admission & Discharge only				

6. Legal Services

Frequency of Review	Extent of Follow-up			
	Not At All	To Some Extent	To A Great Extent	To A Very Great Extent
A Not Applicable	A	A	A	A
A Weekly				
A Bi-monthly				
A Monthly				
A Greater than monthly				
A At Admission only				
A At Admission & Discharge only				

7. Family/Child Care Services

Frequency of Review	Extent of Follow-up			
	Not At All	To Some Extent	To A Great Extent	To A Very Great Extent
A Not Applicable	A	A	A	A
A Weekly				
A Bi-monthly				
A Monthly				
A Greater than monthly				

A At Admission only				
A At Admission & Discharge only				

8. Transportation Services

Frequency of Review	Extent of Follow-up			
	Not At All	To Some Extent	To A Great Extent	To A Very Great Extent
A Not Applicable	A	A	A	A
A Weekly				
A Bi-monthly				
A Monthly				
A Greater than monthly				
A At Admission only				
A At Admission & Discharge only				

9. Continuing Care/Aftercare Services

Frequency of Review	Extent of Follow-up			
	Not At All	To Some Extent	To A Great Extent	To A Very Great Extent
A Not Applicable	A	A	A	A
A Weekly				
A Bi-monthly				
A Monthly				
A Greater than monthly				
A At Admission only				
A At Admission & Discharge only				

10. Other Services

Frequency of Review	Extent of Follow-up			
	Not At All	To Some Extent	To A Great Extent	To A Very Great Extent
A Not Applicable	A	A	A	A
A Weekly				
A Bi-monthly				
A Monthly				
A Greater than monthly				

A At Admission only				
A At Admission & Discharge only				

H-2.1(B): FREQUENCY OF ASSESSMENT-CLIENT

How often does a client have the opportunity to provide input or information on the following needs? To what extent do clients request additional assistance in meeting these needs?

2. Medical Services

Opportunity to Provide Input	Extent Additional Assistance is Requested			
	Not At All	To Some Extent	To A Great Extent	To A Very Great Extent
A Not Applicable	A	A	A	A
A Weekly				
A Bi-monthly				
A Monthly				
A Greater than monthly				
A At Admission only				
A At Admission & Discharge only				

11. Psychological Services

Opportunity to Provide Input	Extent Additional Assistance is Requested			
	Not At All	To Some Extent	To A Great Extent	To A Very Great Extent
A Not Applicable	A	A	A	A
A Weekly				
A Bi-monthly				
A Monthly				
A Greater than monthly				
A At Admission only				
A At Admission & Discharge only				

Educational Services

Opportunity to Provide Input	Extent Additional Assistance is Requested			
	Not At All	To Some Extent	To A Great Extent	To A Very Great Extent
A Not Applicable	A	A	A	A
A Weekly				
A Bi-monthly				
A Monthly				
A Greater than monthly				
A At Admission only				
A At Admission & Discharge only				

12. Vocational Services

Opportunity to Provide Input	Extent Additional Assistance is Requested			
	Not At All	To Some Extent	To A Great Extent	To A Very Great Extent
A Not Applicable	A	A	A	A
A Weekly				
A Bi-monthly				
A Monthly				
A Greater than monthly				
A At Admission only				
A At Admission & Discharge only				

13. Financial Services

Opportunity to Provide Input	Extent Additional Assistance is Requested			
	Not At All	To Some Extent	To A Great Extent	To A Very Great Extent
A Not Applicable	A	A	A	A
A Weekly				
A Bi-monthly				
A Monthly				
A Greater than monthly				
A At Admission only				
A At Admission & Discharge only				

14. Housing Services

Opportunity to Provide Input	Extent Additional Assistance is Requested			
	Not At All	To Some Extent	To A Great Extent	To A Very Great Extent
A Not Applicable	A	A	A	A
A Weekly				
A Bi-monthly				
A Monthly				
A Greater than monthly				
A At Admission only				
A At Admission & Discharge only				

15. Legal Services

Opportunity to Provide Input	Extent Additional Assistance is Requested			
	Not At All	To Some Extent	To A Great Extent	To A Very Great Extent
A Not Applicable	A	A	A	A
A Weekly				
A Bi-monthly				
A Monthly				
A Greater than monthly				
A At Admission only				
A At Admission & Discharge only				

16. Family/Child Care Services

Opportunity to Provide Input	Extent Additional Assistance is Requested			
	Not At All	To Some Extent	To A Great Extent	To A Very Great Extent
A Not Applicable	A	A	A	A
A Weekly				
A Bi-monthly				
A Monthly				
A Greater than monthly				
A At Admission only				

A At Admission & Discharge only				
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17. Transportation Services

Opportunity to Provide Input	Extent Additional Assistance is Requested			
	Not At All	To Some Extent	To A Great Extent	To A Very Great Extent
A Not Applicable	A	A	A	A
A Weekly				
A Bi-monthly				
A Monthly				
A Greater than monthly				
A At Admission only				
A At Admission & Discharge only				

18. Continuing Care/Aftercare Services

Opportunity to Provide Input	Extent Additional Assistance is Requested			
	Not At All	To Some Extent	To A Great Extent	To A Very Great Extent
A Not Applicable	A	A	A	A
A Weekly				
A Bi-monthly				
A Monthly				
A Greater than monthly				
A At Admission only				
A At Admission & Discharge only				

19. Other Services

Opportunity to Provide Input	Extent Additional Assistance is Requested			
	Not At All	To Some Extent	To A Great Extent	To A Very Great Extent
A Not Applicable	A	A	A	A
A Weekly				
A Bi-monthly				
A Monthly				
A Greater than monthly				

A At Admission only				
A At Admission & Discharge only				

H-2.2: 11 MAJOR CATEGORIES OF CLIENT NEED

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- Psychological;
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- Vocational;
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- Continuing Care/Aftercare; and
- Other